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Product Brief

Fish and Seafood Products

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Report Highlights:

Five straight years of strong economic growth (7.3 percent in 2003) and consumer incomes that are increasing at an even faster rate have helped boost domestic consumption of fish and seafood products in Russia. At the same time, stagnant local production helped push imports of fish and seafood products to more than \$377 million in 2002 – an increase of nearly forty percent. Growing consumer demand for more variety is creating opportunities for a wide range of products. The following products represent the best opportunities for U.S. suppliers: salmon, hake, herring, Alaska pollock, tuna, frozen octopus/squid, frozen shrimp, frozen crabs, oysters, scallops, mussels, lobster, and other specialty products.

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SECTION I. MARKET SUMMARY

Russia has a strong tradition of fish and seafood production dating back to the Soviet era when it was one of the leading producers/exporters. In fact, Russia is still the eighth largest producer in the world. (For more information on the Russian seafood industry, please see FAS Gain Report #RS3033). However, Russia's domestic market is far from saturated for a wide range of fish and seafood products.

Five straight years of strong economic growth (GDP up 7.3 percent in 2003) and consumer incomes that are increasing at an even faster rate have helped boost domestic consumption of fish and seafood products. More important, Russian consumers are increasingly demanding greater variety and quality. As a result, local retail outlets and restaurants now offer a wide range of both traditional products (herring, Alaska Pollack, mackerel, salmon) and more exotic items such as squid, prawns, mussels, and oysters. At the same time, expanding local production of new semi-prepared or convenience foods is creating new markets for high quality inputs.

Russia's total imports of fish and seafood products surged to more than \$377 million in 2002 – an increase of nearly 37 percent. Whole frozen fish accounted for most of the total (60 percent), imports of fresh fish, fillets and shellfish almost doubled year-over-year. In fact, while overall imports have recovered nearly to the pre-1998 economic crisis level, imports of shellfish have already exceeded the pre-crisis levels and appear poised for further growth. Clearly, rising incomes and increasing consumer demand for new and higher quality products are creating new market opportunities for a wide range of U.S. fish and seafood products.

ADVANTAGES AND CHALLENGES FACING U.S. EXPORTERS

<i>Advantages</i>	<i>Challenges</i>
Local supply of fish and seafood products cannot fully meet domestic market demand	U.S. suppliers/exporters are not fully aware of the opportunities in the Russian fish and seafood market
Growing consumer demand for more variety and better quality products is creating new import opportunities	Russian buyers are not familiar with the wide variety and quality of U.S. fish and seafood products
Rapid growth of Russia's retail and HRI sectors is creating new sales venues	Strong competition from Western European suppliers, particularly Norway, the Baltics and the UK, also China
U.S. products are more competitive due to favorable shifts in Euro/dollar and Ruble/dollar exchange rates	Higher transportation costs and longer shipping time for products from the U.S.

SECTION II. ROAD MAP FOR MARKET ENTRY

MARKET OVERVIEW

Domestic consumption of fish and seafood products declined sharply following the fall of the Soviet Union as the local seafood industry fell into disarray. The reduced catch pushed consumer prices higher, and consumption fell from more than 20 kilograms (kg) per capita in the late 1980's to less than 10 kg in the early 1990's. While consumption has begun to

recover, largely due to five consecutive years of strong economic growth, the current per capita level of 10.5 kg is still well below historic levels. Not surprisingly, consumption is higher in the fishing regions of Russia (16-20 kg). Consumption is also higher in Moscow (around 15 kg) and St. Petersburg due to higher average incomes. These figures prove the point that there is considerable room for growth as consumer incomes continue to improve.

Table 1: Market Volume/Per Capita Consumption of Fish and Seafood, 1997-2002

	1997	1998	1999	2000	2001	2002
Total market (1,000 MT)	1,368	1,438	1,449	1,514	1,507	1,509
Per capita (kg)	9.3	9.8	9.9	10.4	10.4	10.5

Some analysts suggest that Russian fish and seafood consumption is unlikely to grow significantly even as incomes improve. In fact, analysts note that, traditionally, fish has been viewed as a cheap food source. In this respect, the combination of poor image and higher prices would be a strong disincentive to expanding consumption.

However, more recent trends seem to indicate that many consumers are beginning to recognize the health benefits of eating fish and seafood. In addition, there is strong evidence that Russian consumers react positively to promotional efforts. The Norwegian Seafood Promotion Council has been very effective in raising Russian consumers' awareness and consumption of Norwegian salmon.

Estimates of market composition by product type vary, but frozen and canned/preserved fish account for nearly 90 percent of total domestic consumption. The convenience or semi-prepared seafood product category is one of the fastest growth areas but such products still account for a relatively small share of the domestic market. Following is a breakdown of fish consumption in Russia by product category (2002):

Table 2: Market Share by Product Type, 2002

Type of Product	Market Share (%)
Frozen	72
Canned	8
Preserves	7
Semi-finished products	5
Salted, smoked	4
Live/chilled	3
Cut fish	1

Source: Russian Food Market magazine, #6, 2003

Based on sales volume, herring, mackerel and sardines are the most popular fish in Russia. However, other types of fish, especially salmon, are becoming increasingly popular. As noted above, semi-prepared or convenience fish and seafood products account for a relatively small share of total consumption. However, sales of such products, particularly imitation crab, have increased sharply over the past several years as consumers began to look for more variety and convenience.

MARKET STRUCTURE

Most fish and seafood importers/distributors are located in Moscow and St. Petersburg. At present, over 2,000 companies in Russia are engaged in fish and seafood trade. More than 200 distributors supply fish and seafood products to the Moscow region alone. Of these, 11 companies account for more than 50 percent of the fish and seafood market in Moscow.

RETAIL FOOD SECTOR

Moscow-based importers and wholesalers are the major fish and seafood suppliers to the local retail outlets. In addition, a few of the larger retail chains directly import some processed fish and seafood products, delicacies, live and chilled fish.

While supermarket/hypermarket chains currently account for only about 20 percent of total retail sales in Moscow and less than 10 percent for the country as a whole, these chains are expanding rapidly and must be considered prime targets for increasing sales of fish and seafood products, particularly for fresh fish and seafood, as well as semi-prepared or convenience foods. Despite the rapid growth of the supermarket chains, traditional outdoor markets still account for about 43 percent of total retail sales and also remain an important target for fish and seafood products.

At this point, there are also more than 40 specialized stores in Moscow, typically offering up to 100 different fish and seafood products. However, many of these outlets are trying to increase the range of their products and are gradually switching to a supermarket format. Typically, fish and seafood products in such stores account for slightly more than 50 percent of the total product offering, with other food products accounting for about 30 percent and 20 percent for beverages and take-away foods (prepared salads, cold cuts, cheeses, etc.)

HRI SECTOR

Russian consumers are beginning to recognize the nutritional value of fish and seafood products, and consumption of these products in Russian restaurants is growing quickly. Mediterranean and Japanese cuisines, which feature typically fish and seafood products, have become very popular. In fact, Japanese restaurants are now among the most popular in Russia, with several local chains and many independent outlets in Moscow, St. Petersburg, and other cities. Although the explosive growth of Japanese restaurants and sushi-bars of the past several years has slowed, sushi-bars can be found almost anywhere in Moscow. In fact, it is not unusual to find sushi bars in traditional Russian, Italian, Mexican, and even German restaurants.

The fast-food fish restaurant segment is also expanding quickly. For instance, the 'Ledovo' company opened its first fast-food restaurant in Moscow last year. Currently, the restaurant is offering a wide range of fish and seafood - some 50 different fish courses. The company plans to open ten more restaurants in the near future.

The latest trends for seafood in local restaurants:

- Popularity of black cod from Alaska
- Greater demand for mussels, scallops, crabs and caviar
- Increasing consumption of freshwater fish
- Growing interest in exotic/novelty fish and seafood

Although restaurants are the major consumers of live and chilled fish products, this market is still developing. In addition, most local wholesalers/distributors do not have the special equipment needed for the storage and transportation of live and chilled fish.

FOOD PROCESSING SECTOR

Over the last five years, the range of processed fish and seafood products available to consumers has become more diversified. Among the products offered: frozen semi-finished products, canned/preserved, processed whole fish (salted, smoked, etc.), processed roe, processed seafood salads, and others. The sector has undergone great change with the opening of new facilities and the reconstruction/rehabilitation of some existing fish processing plants. Market analysts predict that total production (not including canned fish) will increase by 20-30 percent in the near term.

Canned/preserved fish products account for about seven percent of the market, primarily consisting of herring, red delicacy fish, mackerel, Baltic herring, and sprat. The semi-prepared/convenience fish and seafood product segment, covering about five percent of the market, is one of the fastest growing areas. Within this category, imitation crab is growing the fastest.

The Russian processed fish and seafood market is generally characterized by the lack of national distributors. The majority of manufacturers sell their production only in nearby regions. However, national brands are appearing. Currently the most famous brands are Nord (Murmansk), ROK-1 and Severny Mir (St. Petersburg), Morskoi Zamok (Moscow).

IMPORTS

Russia imported nearly \$380 million worth of fish and seafood products in 2002. The bulk of imports were frozen products (whole fish and fillets comprised 89 percent and 6 percent of the total, respectively), including herring, mackerel, sprats, capelin, blue whiting and cod. Pickled and smoked fish accounted for about three percent of total imports. Seafood for further processing makes up more than 80 percent of Russian imports.

Table 3: Imports of Fish and Seafood, 1997-2002 (\$1,000)

HS Code	Category	1997	1998	1999	2000	2001	2002
0301	Fish, live, edible	315	91	296	51	228	215
0302	Fish, chilled	3,871	4,256	2,818	2,798	6,132	13,449
0303	Fish, frozen	220,707	137,985	94,999	110,800	161,449	226,102
0304	Fillet	46,025	18,720	10,152	7,030	15,891	31,466
0305	Fish, dried	16,287	8,291	4,198	2,975	4,087	5,848
0306	Crustaceans	12,370	8,874	2,937	3,644	11,027	19,759
0307	Molluscs	2,235	1,889	1,175	1,236	5,082	10,825
03	Subtotal	302,805	181,102	117,572	129,532	204,895	308,664
1604	Preserved fish/roe	91,657	74,787	38,066	28,658	67,807	65,881
1605	Preserved crust./molluscs	1,302	1,146	761	1,044	2,390	3,561
	Total	397,199	257,579	155,513	159,512	275,661	377,106

Source: Russian State Customs Committee

Norway is Russia's largest supplier of fish and seafood products, accounting for more than 41 percent of Russia's total imports in 2002. In fact, Norway supplied 95 percent of the \$79 million herring import market and 21 percent of the \$49 million market for mackerel

(trailing only the United Kingdom). Russia is also Norway's largest export market for both herring and mackerel. In addition to herring and mackerel, Norway is making a very strong push to expand the Russian market for salmon. Norwegian suppliers already cover more than 80 percent of Russia's salmon imports, and the Norwegian Seafood Export Council has predicted that Russia could become one of the largest markets for Norwegian salmon.

Other major suppliers include Latvia, the United Kingdom and Denmark. Imports from China and Lithuania have also surged in the past several years. The table below identifies Russia's major fish and seafood suppliers during the 1997-2002 period.

Table 4: Imports of Fish and Seafood by Origin, 1997-2002 (\$1,000)

Country	1997	1998	1999	2000	2001	2002
Norway	127,070	77,004	47,068	68,693	93,480	155,322
Latvia	25,083	16,444	11,177	10,526	33,847	39,322
United Kingdom	20,600	8,730	10,150	16,229	12,365	24,166
Denmark	14,420	9,357	3,035	4,467	10,786	24,024
China	4,181	5,174	1,752	2,839	13,312	19,365
Lithuania	3,757	1,763	2,826	2,854	8,449	14,942
Kazakhstan	7,778	8,636	4,872	6,801	9,988	12,762
Mauritania	1,335	2,386	5,275	6,988	21,404	12,233
Estonia	15,752	10,822	5,674	4,906	8,281	7,495
Ukraine	16,452	17,703	8,474	3,738	10,940	6,544
Chile	4,410	1,467	495	277	3,901	6,168
Poland	7,841	6,022	4,737	1,808	3,369	4,082
Spain	2,354	1,766	622	680	2,322	4,077
United States	9,270	7,704	9,041	6,421	4,663	4,032
Canada	4,136	3,193	1,135	651	2,767	3,429
Finland	7,940	5,166	3,240	2,326	3,155	3,337
Sweden	4,985	1,862	685	546	1,266	2,938
France	6,148	3,741	1,995	1,954	1,453	2,843
Germany	15,695	7,591	1,821	1,541	1,945	2,344
Iceland	23,283	12,749	2,559	1,515	1,979	531
Other	74,755	48,373	28,950	13,896	26,242	27,455
TOTAL	397,199	257,579	155,513	159,512	275,661	377,106

Source: Russian State Customs Committee

As the preceding table shows, imports from the United States have actually declined in recent years. However, favorable shifts in Euro/Dollar and Ruble/Dollar exchange rates have raised Russian buyers' interest in sourcing fish and seafood products from the U.S.

The following U.S. fish and seafood products represent the best opportunities for the Russian food market: herring, Alaska pollock, hake, tuna, red caviar, frozen octopus, frozen shrimps, oysters, scallops, mussels, frozen crabs, frozen squids, frozen shellfish, lobsters, and novelty products.

Table 5: Imports of Fish and Seafood from the United States, 2002

HS Code	Fishery & Seafood Products	Metric Tons	\$1,000
0303	Fish, frozen, excluding fillets and other fish of heading 0304	5,697	2,430
030311	Sockeye salmon (red salmon) (<i>Oncorhynchus nerka</i>)	33	41
030322	Atlantic salmon (<i>Salmon salar</i>)	19	31
030378	Hake (<i>merluccius</i> spp.)	n/a	1,432
030379	Other	148	199
030380	Livers and roes	768	722
0304	Fish fillets/other (whether or not minced), fresh/chilled/frozen	870	893
030420	Frozen fillets	52	223
030490	Other	809	433
0305	Fish, dried, salted or in brine; smoked fish, whether or not cooked before or during the smoking process; flours, meals and pellets of fish, fit for human consumption	200	287
0306	Crustaceans, whether in shell or not, live, fresh, chilled, frozen, dried, salted, brine or cooked	8	68
0307	Mollusks, whether in shell or not, live, fresh, chilled, frozen, dried, salted, brine or cooked	26	127
1604	Preserved fish and roe	216	222
TOTAL		7,017	4,032

Source: Russian State Customs Committee

Note: Columns do not total due to sub-categories

PRICES

Local wholesale and retail prices for imported and domestic fish and seafood products continue to increase both in ruble and dollar terms. Shifts in the Euro/Ruble exchange rate have had the greatest impact since the bulk of Russia's imports are purchased in Euros. However, favorable shifts in Euro/Dollar and Ruble/Dollar exchange rates have had a positive impact on the price competitiveness of U.S. fish and seafood products. As a result, Russian buyers have been showing much greater interest in finding new U.S. products and sources. Actual purchases have also increased sharply during the past year.

Prices for fish and seafood products vary significantly on a seasonal basis during the year, tending to rise before national holidays and decline in the summer (from mid-May to mid-September). The following table shows the range of prices for various types of fish and provides a comparison between 2002 and 2003 price levels.

Table 6: Domestic Wholesale Prices for Selected Fish and Seafood

Type of Fish	Prices (2002)			Prices (2003 - 1 st quarter)		
	Rb/kg		\$/kg	Rb/kg		\$/kg
	Max	Min	Avg	Max	Min	Avg
Herring:						
- frozen	30.00	17.10	0.75	33.50	18.00	0.84
- salted	39.60	33.10	1.15	39.50	36.00	1.24
Cod, frozen	64.70	52.80	1.85	70.00	61.00	2.15
Navaga, frozen	22.00	22.00	0.69	26.00	21.00	0.77
Alaska Pollack, frozen	45.00	35.70	1.28	43.80	39.80	1.37
Flounder, frozen	40.00	36.50	1.21	41.50	35.00	1.25
Halibut:						
- frozen	124.30	103.80	3.62	126.00	84.20	3.46
- smoked	180.00	167.50	5.52	190.50	163.40	5.80
Redfish, frozen	57.80	46.80	1.66	62.00	47.00	1.73
Smelt, frozen	45.00	45.00	1.48	48.60	45.90	1.50
Mackerel:						
- frozen	49.40	30.60	1.31	55.80	39.00	1.50
- smoked	80.00	64.30	2.37	82.60	61.40	2.29
Salmon, Siberian:						
- frozen	50.50	45.60	1.58	55.60	47.50	1.64
- smoked	106.00	85.40	3.14	103.00	92.80	3.21
- salted	80.00	73.50	2.52	83.70	70.60	2.53
Salmon, Pink:						
- frozen	43.00	38.70	1.34	45.20	41.50	1.42
- smoked	72.60	65.00	2.26	76.20	68.00	2.36
- salted	64.50	52.00	1.91	69.00	56.40	2.06

Source: 'Fish and Seafood' magazine, # 2 (22), 2003

IMPORT DUTIES

The import duty for most fish and seafood products is 10 percent. The following table provides the duties for some products that are exceptions to the standard rate.

Table 7: Import Duties for Selected Fish and Seafood Products

HS Code	Product Description	ImportDuty
0303.50.0000	Herring (<i>Cluaea harengus</i> , <i>Cluaea aallasii</i>), excluding livers and roes	10%, but not less than 0.04 Euros/kg
0303.74.3000	Scomber – (<i>Scomber scombrus</i> and <i>Scomber japonicus</i>)	10%, but not less than 0.06 Euros/kg
0303.74.9000	Scomber – (<i>Scomber australasicus</i>)	10%, but not less than 0.06 Euros/kg
0303.79.2100	Fish of the genus <i>Euthynnus</i> -- Whole	10%, but not less than 0.05 Euros/kg

0303.79.2300	Fish of the genus Euthynnus -- Gilled and gutted	10%, but not less than 0.05 Euros/kg
0303.79.2900	Fish of the genus Euthynnus -- Other (for example 'heads off')	10%, but not less than 0.05 Euros/kg
0303.79.3100	Fish of the genus Euthynnus -- Other	10%, but not less than 0.05 Euros/kg
0303.79.3500	Redfish – (Sebastes marinus)	10%, but not less than 0.05 Euros/kg
0303.79.3700	Redfish – Other	10%, but not less than 0.05 Euros/kg
0303.79.4100	Fish of the species Boreogadus saida	10%, but not less than 0.05 Euros/kg
0303.79.5100	Ling (Molva spp.)	10%, but not less than 0.05 Euros/kg
0303.79.5500	Alaska pollack (Theragra chalcogramma) and pollack (Pollachius pollachius)	10%, but not less than 0.05 Euros/kg
0303.79.7100	Sea bream (Dentex dentex and Pagellus spp.)	10%, but not less than 0.05 Euros/kg
0303.79.7500	Ray's bream (Brama spp.)	10%, but not less than 0.05 Euros/kg
0303.79.8300	Blue whiting (Micromesistius poutassou or Gadus poutassou)	10%, but not less than 0.05 Euros/kg
0303.79.9100	Horse mackerel (scad) (Caranx trachurus, Trachurus trachurus)	10%, but not less than 0.05 Euros/kg
0305.10.0000	Flours, meals and pellets of fish, fit for human consumption	5%
0305.20.0000	Livers and roes, dried, smoked, salted or in brine	20%
0305.41.0000	Pacific salmon (Oncorhynchus spp), Atlantic salmon (Salmon salar) and Danube salmon (Hucho hucho)	20%, but not less than 4 Euros/kg

IMPORT REQUIREMENTS/CERTIFICATION

All imports of fish and seafood products require the following certificates:

- Certificate of Origin (in English)
- Health Certificate (in English and Russian)
- Packing List (this document is especially important for mixed cargo and must include the quantity of fish and/or seafood products, plus pallets and other containers)

The following certificates are not required, but may be requested by the importer/end user:

- Certificate of Conformity/Hygiene (in Russian)
- Quality Certificate from U.S. producer

Russian officials require the **Certificate of Origin** as proof of the country of origin for all imported food products. The certificate of origin is also used to determine any duty preferences.

As noted above, a **Health Certificate** issued by a U.S. government-approved authority must accompany all imports of fish and seafood products. The certificate confirms that the product meets all specified health and sanitary specifications. When the shipment arrives at Russian customs, the importer must exchange the **Health Certificate** for a Russian **Veterinary Svidetelstvo**.

The **Certificate of Conformity** is issued when a product is found to conform to Russian standards or "GOST". In some cases, GOST recognizes other countries' certifications. For example, if the products have already met U.S. standards, these will be compared to the Russian standards and may be judged to be sufficient. Certifications issued previously may exempt products from testing and may speed up an application procedure.

In addition, the U.S. exporter must provide Russian language labeling for each product package (such as box or bag).

Below is a list of some specific information that must be on the label:

- Name of the product
- Name, country, address of producer, packer, exporter and importer of the product
- Weight (net and gross) or volume of the product
- Storage conditions
- Shelf-life of the product

Also, any fish and seafood item packaged for retail sale must have labeling in the Russian language. To avoid problems, U.S. suppliers should always confirm all labeling and documentation requirements with their Russian importers.

For additional information on Russian import regulations and standards, please see the FAS GAIN report #RS3020 *Food and Agricultural Import Regulations and Standards* at www.fas.usda.gov under **Attaché Reports**.

SECTION III. KEY CONTACTS AND FURTHER INFORMATION

CONTACT INFORMATION FOR FAS OFFICES IN RUSSIA AND THE US:

U.S. Agricultural Trade Office
American Embassy
Bolshoy Devyatinskiy Pereulok 8
121099 Moscow, Russia
Tel: 7 (095) 728-5560; Fax: 7 (095) 728-5069
E-mail: atomoscow@usda.gov

Jeffrey Hesse, Director

For mail coming from the U.S.:

Agricultural Trade Office
PSC 77 AGR
APO, AE 09721

For international mail:

Agricultural Trade Office
U.S. Embassy - Box M
Itainen Puistortie 14
00140 Helsinki, Finland

Covering Northwest Russia (St. Petersburg):

ATO Marketing Assistant
American Consulate General
Nevskiy Prospekt, 25
191186 St. Petersburg, Russia
Tel: 7 (812) 326-2580; Fax: 7 (812) 326-2561
E-mail: Maria.Baranova@usda.gov

Covering the Russian Far East (Vladivostok):

ATO Marketing Assistant
American Consulate General
Ulitsa Pushkinskaya, 32
690001 Vladivostok, Russia
Tel: 7 (4232) 300-070 or 300-089
Fax: 7 (4232) 300-089
E-mail: Svetlana.Ilyina@usda.gov

For General Information on FAS/USDA Market Promotion Programs and Activities:

AgExport Services Division
Room 4939
14th and Independence, SW
Washington, DC 20250
Tel: (202) 720-6343; Fax: (202) 690-0193

USDA/FAS AND ATO PROGRAMS AND SERVICES

The Foreign Agricultural Service and the Agricultural Trade Office/Moscow offer a variety of programs, services, and information resources to help U.S. exporters of food, beverage, and agricultural products learn more about the Russian market, establish initial contact with Russian buyers, and promote their products in the local market. Following is a partial listing of programs and services:

Trade Leads are direct inquiries from Russian buyers seeking U.S. sources for specific food, beverage, or agricultural products. U.S. companies can receive these Trade Leads by contacting the AgExport Services Division, FAS/USDA or by visiting the USDA/FAS Homepage (see contact information at the beginning of this section).

Buyer Alert is a bi-weekly publication providing information on specific food, beverage, and agricultural products offered by U.S. exporters. U.S. companies may place ads in Buyer Alert by contacting the AgExport Services Division, FAS/USDA (see contact information at the beginning of this section).

U.S. Supplier Lists are drawn from an extensive database of companies that can supply a wide range of U.S. food, beverage, and agricultural products. The ATO Moscow supplies these lists to Russian importers on request. U.S. companies that wish to be included in this database should contact the AgExport Services Division, FAS/USDA (see contact information at the beginning of this section).

Foreign Buyer Lists are drawn from an extensive database of Russian importers dealing with a wide range of food, beverage, and agricultural products. U.S. companies can order these lists through the AgExport Services Division, FAS/USDA (see contact information at the beginning of this section).

ATO/Moscow also coordinates U.S. participation in local trade shows (see list of Russian Trade Shows below), sponsors supermarket and menu promotions, provides support for trade missions, and can help arrange appointments for first-time visitors to Russia. For more detail on these and other programs or activities, please contact the ATO/Moscow (see contact information above).

The FAS website (www.fas.usda.gov) is an excellent source of information on other USDA/FAS export promotion/assistance programs, such as the Market Access Program (MAP) and Credit Guarantee Programs, as well as a wide range of information and reports on market opportunities for U.S. food, beverage, and agricultural exports world-wide.

OTHER MARKET REPORTS

Reports on the Russian food and agricultural market are available on the FAS website. U.S. exporters may also contact ATO/Moscow for copies of these reports (see contact information at the beginning of this section). The following reports may be of particular interest:

Report Title	Report #	Report Summary
Exporter Guide	RS4301	Provides an overview of the Russian food market, identifying opportunities for U.S. food and beverage products in the retail, HRI, and processing sectors
Food Processing Ingredients	RS4302	Examines the Russian food processing sector, focusing on market opportunities for U.S. food ingredients, including raw, semi-processed and specialty products
HRI Food Service	RS4304	Examines Russian hotel/restaurant/institutional sector, focusing on market opportunities for U.S. products in the food service industry
The Russian Marketplace	RS3310	Quarterly newsletter highlighting developments in the Russian food retail, HRI, and processing sectors
Food and Agricultural Import Regulations and Standards	RS3020	Detailed information on Russia's food import requirements, including certification, labeling and packaging requirements
New Resolution Concerning Use of GMOs in Food Products	RS3031	Overview of new regulations concerning the testing and approval of foods containing of genetically-modified organisms (GMOs)
Livestock and Products Annual	RS3018	Review of the Russian market for beef and pork, including production, consumption and trade.
Poultry and Products Annual	RS3019	Analysis of the Russian market for poultry meat, including production, consumption and trade.
Fishery Products Annual	RS3033	Overview of the Russian market for fish and seafood products meat, including production, consumption and trade.

OTHER USEFUL CONTACTS

American Chamber of Commerce in Russia
Kosmodamianskaya Nab. 52, Building 1, 8th floor
113054 Moscow, Russia
Tel: (095) 961-2141; Fax: (095) 961-2142
Email: amcham@amcham.ru

American Chamber of Commerce in St. Petersburg
25 Nevsky Prospect
191186 St. Petersburg, Russia
Tel: (812) 326-2590; Fax: (812) 326-2591
Email: sbytchkov@amcham.ru

For questions on agricultural machinery, food processing and packaging equipment/materials, refrigeration equipment, etc., please contact the U.S. & Foreign Commercial Service:

Foreign Commercial Service
Bldg. 2, 23/38 Bolshaya Molchanovka
121069 Moscow, Russia
Tel: 7 (095) 737-5030; Fax: 7 (095) 737-5033
E-mail: moscow.office.box@mail.doc.gov

TRADE SHOWS IN RUSSIA

The following specialized shows present unique opportunities to introduce U.S. fish and seafood products to the Russian market:

Seafood Russia 2004 (April 13-15, 2004 – Moscow)

Organized by London-based trade show organizer 'Heighway Events' and local organizer 'Central European Exhibitions', the first *Seafood Russia* conference and show will be held April 13-15, 2004. Major areas of focus include fish and seafood semi-processed and ready-to-eat products, aquaculture, processing equipment and technology, and transportation.

For more information, please contact:

'Central European Exhibitions' OOO
Tel: (+7-095) 788-6553
Fax: (+7-095) 788-6554
Email: seafood@expocee.ru
Web: seafood-russia.ru

InRybProm-2004 International Fish and Seafood Show (June 22-25, 2004 – St. Petersburg)

Organized by the State Fishing Committee of the Russian Federation and show organizer Lenexpo, *InRybProm* will be held for the ninth consecutive year. About 500 companies from 25 countries are expected to participate in the show. Major topics include fishing equipment and technology, fish and seafood processing, packaging, transportation, and storage.

For more information, please contact:

LENEXPO OAO
Bolshoy pr., V.O., 103
199106 St. Petersburg
Tel/fax: (7-812) 321-2637 or 321-2654
E-mail: shapkin@mail.lenexpo.ru
Web: www.lenexpo.ru

Northwest Food Forum (April 13-15, 2004 - St. Petersburg)

The *Northwest Food Forum/Interfood* trade show is held annually in St. Petersburg and is the largest general food show in Northwest Russia. In 2003, the number of exhibitors increased 25 percent and visitor attendance was up by 30 percent over the previous year. Please contact the ATO Marketing Assistant in St. Petersburg or the U.S. Agricultural Trade Office in Moscow for additional information on the Northwest Food Forum.

World Food Moscow (September 21-24, 2004 - Moscow)

In 2003, *World Food Moscow* drew 950 exhibitors from 50 countries and attracted more than 50,000 visitors from all parts of Russia and from many neighboring countries. This is the longest running general food show in Russia and offers a good opportunity for exhibitors to introduce new food and beverage products to Russian buyers.

Prodexpo (February 2005 - Moscow)

The largest food and beverage exhibition in Russia, *Prodexpo* 2004 attracted 1,900 exhibitors from 55 countries and more than 90,000 visitors from all parts of Russia and from many neighboring countries. For the 2005, FAS will organize a U.S. Pavilion for exhibitors. Please contact the U.S. Agricultural Trade Office in Moscow for additional information.